

INDIANA HOUSING & COMMUNITY DEVELOPMENT AUTHORITY



Indiana Foreclosure Prevention Network

Marketing and Resource Development Services
Request for Proposals

Publication Date: Wednesday, February 3, 2010

Proposal Due Date: Friday, February 12, 2010 by 3:00 EST

SUMMARY AND BACKGROUND

PURPOSE FOR THE REQUEST FOR PROPOSALS (“RFP”).

Indiana Housing and Community Development Authority (“IHCDA”) requests proposals from private or not-for-profit entities to provide marketing and resource development services for the Indiana Foreclosure Prevention Network (“IFPN”) as detailed in the Scope of Services section of this RFP.

DEFINITIONS.

<u>IFPN</u>	The Indiana Foreclosure Prevention Network is a coalition of community service and housing-related organizations, government agencies, lenders, realtors, and trade associations that are actively addressing Indiana’s foreclosure crisis through a variety of methods.
<u>Group Counseling Model</u>	A model for foreclosure prevention counseling where twenty (20) or more homeowners receive counseling at one (1) time.
<u>Group Counseling Event</u>	An event organized to provide foreclosure prevention counseling to twenty (20) or more homeowners at one (1) time.
<u>IFPN Partner</u>	An organization that promotes the IFPN to its constituents or provides non-financial support.
<u>IFPN Financial Partner</u>	An organization that provides direct financial support to the IFPN.
<u>Network Agency</u>	An agency that has received its IFPN certification and has entered into a contract to perform foreclosure prevention counseling services on behalf of the IFPN.

INDIANA HOUSING AND COMMUNITY DEVELOPMENT AUTHORITY.

MISSION

IHCDA’s mission is for every Hoosier to have the opportunity to live in safe, affordable, good-quality housing in economically stable communities. IHCDA believes that growing Indiana’s economy starts at home.

OVERVIEW

IHCDA was created in 1978 by the Indiana General Assembly and is a quasi-public financially self-sufficient statewide government agency. IHCDA’s programs are successful in large part because of the growing network of partnerships we have established with local, state, and federal governments, for-profit businesses and not-for-profit organizations. For-profit partners include investment banks, mortgage

lenders, commercial banks, corporate investment managers and syndicators, apartment developers, investors, homebuilders, and realtors. Not-for-profit partners include community development corporations, community action agencies, and not-for-profit developers. For more information, please visit: <http://www.in.gov/ihcda/>.

INDIANA FORECLOSURE PREVENTION NETWORK

The IFPN was established in November 2007 to assist Indiana families with avoiding foreclosure and maintaining housing stability. The IFPN was developed by a coalition of community organizations, housing-related agencies, government agencies, lenders and banks. Through this partnership of the public, private and nonprofit sectors, a toll-free helpline, 1-877-GET-HOPE was established (the “Helpline”). The Helpline is available seven (7) days a week, from 8:00 a.m. to 8:00 p.m. The Helpline provides access to free and confidential financial consulting with no obligation or commitment for homeowners who may be at risk of facing foreclosure. When a homeowner calls, Helpline operators listen to the homeowner’s issues, and then refer the homeowner to a Network Agency, if appropriate. The website, www.877gethope.org is available twenty-four (24) hours a day, seven (7) days a week and includes an on-line educational workshop as well as the opportunity to complete an on-line assessment and submit it to a certified foreclosure prevention specialist.

IFPN MARKETING

In November 2007, IFPN and Lt. Governor Skillman launched a public awareness campaign to encourage individuals and families facing foreclosure to seek help by calling 1-877-GET-HOPE or by visiting www.877gethope.org. From its outset, the “Don’t Let the Walls Foreclose in on You” campaign has concentrated on grassroots strategies that have resulted in the distribution of more than 350,000 marketing and collateral pieces through IFPN partners such as faith-based organizations and congregations, WorkOne centers, library branches, the 211 system, as well as county and municipal units of government.

Over the past two years, IFPN has purchased radio, print, and billboards in communities experiencing the highest concentrations of foreclosure.

In addition to the mass marketing, IFPN has hosted eight (8) homeowner outreach events that have brought more than 900 homeowners face-to-face with their lenders or housing counselors to discuss options to avoid foreclosure.

In June of 2009, IFPN hosted a Phone-A-Thon. For five (5) hours, the phone lines at three (3) PBS stations were manned by nearly 150 volunteers including housing counselors, attorneys, representatives from the Attorney General’s Office, government volunteers, not-for-profit partners, and lender partners. More than 3,000 troubled homeowners received assistance from the Phone-A-Thon.

To date, the IFPN has assisted approximately 60,000 homeowners who were facing or who were at risk of facing foreclosure. Marketing and outreach activities are crucial to expanding awareness of the IFPN and allowing the IFPN to make contact with even more homeowners facing foreclosure.

SCOPE OF SERVICES

OVERVIEW OF SERVICES.

Respondent shall provide marketing and resource development services for the IFPN.

SPECIFIC SERVICES.

Respondent's services to be delivered under the contract awarded under this RFP shall include services in the following three (3) categories: marketing; resource development; and administration, as more fully described below (respondent's costs for services should be listed by category; see page 5 of this RFP for more details).

MARKETING:

- Coordinate and promote twelve (12) outreach events throughout the State of Indiana with IFPN Partners;
- Distribute 200,000 IFPN brochures to IFPN Partners, Network Agencies, elected officials and other organizations approved by IHCD (IFPN brochures will be supplied by IHCD);
- Identify and train six (6) volunteer speakers to give presentations on behalf of IFPN regarding the IFPN, foreclosure rescue scams, mortgage fraud, etc. at outreach events (speakers and content must be approved by IHCD);
- Widen the reach of the IFPN by developing a rapport with elected officials in each county in the State of Indiana (i.e., legislators, mayors, other city and county representatives);
- Recruit twenty (20) additional IFPN Partners to disseminate IFPN materials to their clients or participate/collaborate in borrower outreach events;
- Develop, update, and maintain content on consumer and counselor IFPN websites (content must be approved by IHCD);
- Recruit six (6) additional IFPN Financial Partners;
- Publish and deliver monthly newsletters, containing upcoming events and initiatives involving the IFPN, to Network Agencies (in an electronic format);
- Provide on-going education regarding the IFPN to county clerks throughout the State of Indiana;
- Obtain at least six (6) media interviews per quarter regarding the IFPN (must receive prior approval from IHCD before participating or committing to any interview);
- Work with IHCD to launch Group Counseling Model in July 2010; and
- Coordinate and implement at least three (3) Group Counseling Events based on the Group Counseling Model.

RESOURCE DEVELOPMENT:

- Seek additional funding sources for IFPN through grants and donations from IFPN Financial Partners to supplement marketing efforts; and
- Establish two (2) new funding sources by applying for grants.

ADMINISTRATION:

- Work with fourteen (14) Pro Bono Plan Administrators to ensure that they are successfully (i) assigning a pro bono attorney to each homeowner involved in the IFPN who needs an attorney and qualifies for pro bono assistance, (ii) arranging settlement conferences for homeowners, and (iii)

moving towards the IFPN's goal of increasing the settlement conference participation rate to twenty-five percent (25%) of all foreclosures in each county in which coordination takes place.

RFP SUBMISSION REQUIREMENTS

The application package consists of one (1) original proposal and two (2) copies. **THE APPLICATION PACKAGE MUST BE SIGNED.** The proposals must be submitted by **3:00 PM, Eastern Standard Time, on Wednesday, February 12, 2010.** All proposals received on or before the deadline will be reviewed for selection. All proposals will be time and date stamped by IHCD A to evidence timely receipt.

Mail proposals to the following address:

IFPN Manager
Indiana Housing & Community Development Authority
30 S. Meridian Street, Suite 1000
Indianapolis, IN 46204
Attention: IFPN Marketing and Resource Development RFP

Any questions related to this RFP should be sent via e-mail to ifpn@ihcda.in.gov.

RFP SUBMISSION ITEMS

A complete proposal includes the information listed below. Proposals received without all of the items will be considered incomplete, and may be withdrawn from consideration.

1. Name, address, phone number, fax number, email address, and brief description of respondent's business (1-2 pages).
2. Résumés of key personnel to be assigned to this project, highlighting skills, abilities, and knowledge relating to the delivery of the proposed services listed in the "Scope of Services" section (See page 4 of this RFP) (1-3 pages).
3. Narrative describing the respondent's skills, abilities, and knowledge relating to the delivery of the proposed services listed in the "Scope of Services" section of this RFP (See page 4 of this RFP) (1 page).
4. Three (3) or more references (1 page).
5. Description of services provided to or for IHCD A within the past five (5) years by the respondent (1-2 pages).
6. Description of services to be provided by the respondent for this RFP (2-4 pages).
7. Cost of providing services listed in the "Scope of Services" section (See page 4 of this RFP) (1-2 pages). Costs should be listed in both a bottom-line format, as well as on a per category basis.
8. Financial statements for previous two (2) years, preferably audited (2-3 pages).

9. Executed copy of Term and Conditions (See page 9 of this RFP) (1 page).

CONFIDENTIAL INFORMATION

Respondents are advised that materials contained in proposals are subject to the Access to Public Records Act (“APRA”), IC 5-14-3 et seq., and after the contract is awarded, the entire file may be viewed and copied by any member of the public. Respondents claiming a statutory exception to APRA must place all confidential documents (including the requisite number of copies) in a sealed envelope marked “Confidential.” IHCDCA reserves the right to make determinations of confidentiality or seek the opinion of the Public Access Counselor. Prices are not confidential information.

KEY RFP DATES

ACTIVITY	DATE
Publication date of RFP	Wednesday, February 3, 2010
Proposal Due Date	Friday, February 12, 2010, by 3:00pm EST
Execute contract with selected respondent	March 1, 2010
Contract expiration date	February 28, 2011

SELECTION PROCESS

IHCDA has selected personnel to evaluate proposals. All evaluation personnel will use the Evaluation Criteria described on page 7.

1. Each proposal will be evaluated for adherence to requirements. Proposals that are incomplete or otherwise do not conform to the RFP Submission Requirements may be eliminated from consideration.
2. Each proposal will be evaluated on the basis of the categories included in the Evaluation Criteria.
3. Based on the results of this evaluation, the qualifying proposal determined to be the most advantageous to IHCDCA may be selected by IHCDCA for further action such as contract negotiations. However if IHCDCA decides that no proposal is sufficiently advantageous to IHCDCA, then IHCDCA may take whatever action is deemed necessary to fulfill its needs. If, for any reason, a proposal is selected however, it is not possible for IHCDCA to consummate a contract with the respondent; IHCDCA may begin contract preparation with the next qualified respondent or determine that no such alternate proposal exists.
4. IHCDCA reserves the right to split the award between multiple respondents and make the award on a category by category basis and/or remove categories from the award.
5. Respondents will be notified by mail or email of IHCDCA’s decision.

EVALUATION CRITERIA

IHCDA will evaluate proposals on the following rubric (maximum score of 40 points) shall include:

CRITERIA	TOTAL POSSIBLE	TOTAL AWARDED	EVALUATOR'S COMMENTS
1. Compliance with all items set forth in the "Requirements for Proposal Response" section	2 points maximum		
2. Skills, abilities, and knowledge of <u>key personnel</u> to be assigned to the project relating to the delivery of the services set forth in the "Scope of Services" section	8 points maximum		
3. Skills, abilities, and knowledge of <u>respondent</u> relating to the delivery of the services set forth in the "Scope of Services" section	5 points maximum		
4. Respondent's references, financial standing and past record of performance on IHCDA contracts over the past five (5) years	9 points maximum		
5. Respondent's plan for providing marketing and resource development services	5 points maximum		
6. Cost to provide all services set forth in the "Scope of Services" section.	9 points maximum		
7. Respondent is an Indiana based organization, employing primarily residents of Indiana	1 point maximum		
8. Respondent is a certified by the State of Indiana as a Minority Business Enterprise (MBE) or a Women Business Enterprise (WBE).	1 point maximum		
	40 points maximum		

TERMS AND CONDITIONS

This RFP is issued subject to the following terms and conditions:

1. This RFP is not an offer and shall under no circumstances be construed as an offer.
2. IHCD A expressly reserves the right to modify or withdraw this RFP or any part of this RFP at any time, whether before or after any proposals have been submitted or received.
3. IHCD A reserves the right to reject and not consider any or all of the proposals that do not meet the requirements of this RFP, including but not limited to: incomplete proposals and/or proposals offering alternate or non-requested services.
4. IHCD A reserves the right to reject any or all proposals, to waive any informality in the RFP process, or to terminate the RFP process at any time, if deemed to be in its best interest.
5. A copy of IHCD A's Contract Boilerplate is attached as an Exhibit to this RFP. By submitting a response to this RFP, respondent acknowledges the acceptance of IHCD A's Contract Boilerplate and the understanding that such Boilerplate is non-negotiable.
6. In the event the respondent selected does not enter into the required contract to carry out the purposes described in this RFP, IHCD A may withdraw the selection and commence negotiations with another party.
7. In no event shall any obligations of any kind be enforceable against IHCD A unless and until a written contract is execute.
6. Each respondent agrees to bear all costs and expenses of its proposal and there shall be no reimbursement for any costs and expenses relating to the preparation of proposal submitted hereunder or for any costs or expenses incurred during negotiations.
7. By submitting a proposal in response to this RFP, each respondent waives all rights to protest or seek any remedies whatsoever regarding any aspect of this RFP, the selection of a respondent or respondents with whom to negotiate, the rejection of any or all offers to negotiate, or a decision to terminate negotiations.
8. IHCD A reserves the right not to award a contract pursuant to this RFP.
9. IHCD A reserves the right to split the award between multiple respondents and make the award on a category by category basis and/or remove categories from the award.
10. All proposals received will become the property of IHCD A and will not be returned.

Respondent's Name: _____

Title: _____

Address: _____

Phone: _____ Fax: _____

Signature: _____ Date: _____